

## Matthew Arena

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**From:** owner-efa-group@listserv.fnal.gov on behalf of jtrumbo [jtrumbo@fnal.gov]  
**Sent:** Thursday, September 02, 2010 3:53 PM  
**To:** efa-group; cshay@fnal.gov  
**Subject:** change request process

all,  
a couple of issues raised yesterday in the demo i'd like to address. i would like a few standards for our group. note OUR GROUP, i am not speaking for nor making policy for any other grp ldr.

1. cross reference the pta to the crq and vice versa. please put the pta number in the summary field which is on the top section of the change request, in the change request information area. for EXAMPLE, '15000 change ftl effort report'. do not put the word 'pta' or 'PTA' or '#' or anything, simply the pta number. we will then be able to sort on the summary field on the change console screen.

there has been discussion about putting the \*link\* to the pta on the crq. at this point, i will be happy with the number in the summary field.

we have asked for an additional field, crq, in the pta under 'more item information', to add the xreference to the crq. this is not yet approved nor complete. till that time, please xreference the crq number at the top of 'details'.

2. questions on emergency changes. per discussion with mkaiser, any halts in production are to be addressed immediately so that service is restored as long as the fix will in no way directly or potentially effect another production application. a crq and/or incident can be opened after the fact. for example, if a user runs a report with the wrong date parameter and this prevents progress on payroll or monthend, AND the fix will have NO impact on any other system, we are to make the change and then follow up.

if procard is down and needs a reboot, procard should stay down till an emergency change is authorized, as rebooting procard machine will effect sunflower and cnas. however, if configuration changes related to web server affects other applications (CNAS & SF). It shares the same Oracle Home but every application has its own configuration files. We can bounce Procard reports server, forms server, application & database with out affecting CNAS & SF. Any changes like certificates etc it will affect all applications in the server.

if a user runs a job out of order and hoses up payroll or month end, fix the issue first IF no other application will be effected then followup with an incident/crq. if the fix will potentially effect another production application, an emergency crq is needed.

if a one time data fix scripts which affects only few rows (this happened twice during this month end close). From my experience this happens atleast once in two months. For information related to issues happened this month. see pta 15372, 153753.

3. what is the process by which i now get permission to start development or 'build'? the status of the pta will need to be 'submitted for approval'. the pta will refer to the crq.

the status of the crq will be 'request for change'. the crq will refer to a pta. the crq will have a valid, complete business justification.

after authorization to build is approved in both the pta and crq, but before moving to prod: the pta will contain test plan, test results, etc, much like is done today.

the crq will contain the release documentation and dependent on the scope of the change, additional documentation like a detailed communication plan and backout plan (normally not contained in a pta) will be eventually required in the crq.

this is in no way to be considered the last word on these processes. we are certain many issues will need improvement. just trying to get some guidance out asap.

jt&um